

# ANNUITIES – THE ELECTRONIC COMMON QUOTATION FORM

## DRIVING A BETTER RETIREMENT

### WHAT IS THE ELECTRONIC COMMON QUOTATION FORM?

Fully underwritten annuities offer your clients the ability to significantly enhance their guaranteed retirement income. The electronic common quotation form helps streamline the underwriting process by providing a fully automated online version of the traditional common quotation request form.

The Annuity Detailed Quote service offers a full electronic representation of the Common Quotation Request Form with real time underwritten rates, agreed, and approved by the major providers of enhanced annuities. Previously existing in paper form only, its aim is to simplify and speed up the process of retrieving rates from enhanced annuity providers for clients with health problems.

The form is intuitive with rich data capture and validation to ensure information is correctly formatted.

Our easy-to-use user interface allows you to process Annuity business more efficiently while saving you money.

## FEATURES

### COMPREHENSIVE MEDICAL INPUTS

The following medical conditions will be able to be added to the health questionnaire for annuitant and dependent: Heart, Diabetes, Stroke, Cancer, Multiple Sclerosis, Respiratory, Neurological and Other.

### ACTIVITIES OF DAILY QUESTIONNAIRE

When major conditions are entered an additional Activities of Daily Living questionnaire is offered where impairments to key activities can be entered and associated with the conditions.

### GUARANTEED RATES

Enhanced Providers offer fully guaranteed rates through the service that can be applied for without further underwriting. We are working with all the providers to return guaranteed rates in as many instances as possible.

“iPipeline is dedicated to offering excellent retirement planning solutions through innovative technology. Our enhanced service enables advisers to research and then select the best annuity product to suit their client, quickly and efficiently.”

**Ian Teague, Managing Director, iPipeline UK**

## I CURRENTLY USE THE PAPER VERSION, WHY SHOULD I CHANGE TO ASSUREWEB'S ELECTRONIC FORM?

### SAVE TIME

The paper form can be very admin heavy and therefore time consuming to complete. Assureweb's electronic form removes all the manual processing.

### SAFE AND SECURE

The electronic form means you only have to complete it once, with no need to post or email and wait for responses. With one click you submit the form electronically and immediately you will receive fully guaranteed rates back from providers. Your quotes will be stored securely on Assureweb for up to 30 days. Everything is kept in one location with no risk of forms getting lost.

### SAVE MONEY

Assureweb's Portal, and their Annuity service, is completely free of charge. At a time when other technology partners are charging monthly fees and/or per quote for their services, Assureweb's comprehensive offering may prove a welcome cost-effective solution among advisers for all their clients' annuity needs.

For more information, contact our Customer Support Team:



Call: 0345 408 4022



Email: [uk.support@ipipeline.com](mailto:uk.support@ipipeline.com)

## QUICK QUOTE

The Annuity Quick Quote service provides you with an initial indication of the rates available by inviting you to enter basic information about your clients. The service will produce enhanced rates based on answers to the Smoker and Any Health Issues questions; however, these enhanced rates will be based on assumed conditions only as there are no detailed medical questions on the Quick Quote service. Should you wish to obtain to a full quote; the basic information can be carried forward into the Detailed Annuity Service by clicking on a button on the Quick Quote Results screen.

## DETAILED QUOTE SERVICE

The Annuity Detailed Quote service is an electronic representation of the Common Quotation Request Form (CQRF) which has been agreed and approved by the major providers of enhanced annuities. Previously existing in paper form only, its aim is to simplify and speed up the process of getting offer terms from enhanced annuity providers for those clients who qualify for their rates. All questions asked are relevant, and your client must provide full and accurate information about their health and lifestyle, as the amount of annuity income will be based on this.

## UNDERWRITTEN QUOTES

Fully underwritten quotes are available on the Detailed Quote service based on the health of the annuitant and dependent. In order to access the health questionnaire, you should enter 'Yes' to the below question on the Client Details screen.

The client and the dependant (if applicable) wish to disclose personal/lifestyle or medical information for the purpose of obtaining an annuity quote \*

Yes  No

If you enter 'Yes' further health and lifestyle questions will be available to determine rates available.

## ANNUITANT HEALTH "ACCORDION"

The Annuitant Health tab allows you to add all the medical condition categories that are applicable to your client. There are 9 medical condition categories: Cancer, Diabetes, Heart, High Cholesterol, Hypertension (High Blood Pressure), Multiple Sclerosis, Neurological, Respiratory, Stroke and Other.

If you require a paper form to complete first, go to 'Other Services' under the left-hand menu and you'll find a Data Capture Form to use to collect the information required.

**Client Details** | **Annuitant Health** | Contract Basis | Remuneration | Product Selection

**Add medical conditions**

Please use the drop down list to add all the medical condition categories that apply. You should ensure that do not fall into the list of categories shown. You can add multiple 'Other' conditions and multiple Categories of questions for medical conditions are optional, however you should endeavour to complete all information for the best rate. There is also a Lifestyle questionnaire that should be completed in all cases.

Please select a category to add...

- Lifest
  - Cancer
  - Diabetes
  - Heart
  - High Cholesterol
  - Hypertension (High Blood Pressure)
  - Multiple Sclerosis
  - Neurological
  - Respiratory
  - Stroke
  - Other

⚠ One or more fields contain incomplete data

There will always be a Lifestyle pane at the top of the Accordion as this information is mandatory and must be completed in all cases. Smoker/height/weight/waist measurement/alcohol consumption questions can be found here.

A number of questions throughout the Annuitant health tab are optional; however, you should endeavour to complete all the information as fully as possible to ensure providers can offer the best rate.

Clear Save Quote

20 products available, 18 products able to quote  
[<< Back Next >>](#)

Client Details Annuitant Health Contract Basis Remuneration Product Selection

**Add medical conditions**

Please use the drop down list to add all the medical condition categories that apply. You should ensure every condition is entered, and use 'Other' for conditions that do not fall into the list of categories shown. You can add multiple 'Other' conditions and multiple Cancers if applicable (a maximum of 5 of each). A number of questions for medical conditions are optional, however you should endeavour to complete all information as fully as possible to ensure providers can offer the best rate. There is also a Lifestyle questionnaire that should be completed in all cases.

Please select a category to add...

**+ Lifestyle** ⚠ One or more fields contain incomplete data

[<< Back Next >>](#)

Clear Save Quote

Upon your first visit to the Annuitant Health tab, the Lifestyle pane will be highlighted red with a warning triangle highlighting that it contains one or more incomplete fields. To complete the pane, you must click on the plus symbol which will expand the pane to display all the available fields.

**Lifestyle** ⚠ One or more fields contain incomplete data

[Help on this screen](#)

\* mandatory fields

Currently smoking \*  Yes  No

Previous smoking history  Never smoked / Occasional smoker only  Previous regular smoker

Regular daily smoker for 10 years or more \*  Yes  No

Manufactured cigarettes per day

Cigars per day

Cigar size \*  Mini (less than 3.3g)  Regular (3.3g - 6.5g)  Large (more than 6.5g)

Rolling tobacco per week  g  Grams  Ounces

Pipe tobacco per week  g  Grams  Ounces

Date started (continuously until present) \*

Date stopped \*

Alcohol consumption (units per week)

Height \*  ft  in  Metric  Imperial

Weight \*  st  lb  Metric  Imperial

Waist measurement  in  Metric  Imperial

As it expands it will turn blue, indicating that it is an active pane. If no medical conditions are applicable and you have completed all the mandatory fields on the Lifestyle screen, you can move forward by either clicking “Next” or on the actual tab you wish to visit.

Annuity Comparison - Detailed Quotes

Clear      Save      Quote

20 products available, 18 products able to quote  
[<< Back Next >>](#)

Client  
Details

Annuitant  
Health

Annuitant  
ADL

Contract  
Basis

Remuneration

Product  
Selection

**Add medical conditions**

Please use the drop down list to add all the medical condition categories that apply. You should ensure every condition is entered, and use 'Other' for conditions that do not fall into the list of categories shown. You can add multiple 'Other' conditions and multiple Cancers if applicable (a maximum of 5 of each). A number of questions for medical conditions are optional, however you should endeavour to complete all information as fully as possible to ensure providers can offer the best rate. There is also a Lifestyle questionnaire that should be completed in all cases.

Please select a category to add...

**+ Lifestyle**
✔ Valid data entered

**+ Diabetes**
⚠ One or more fields contain incomplete data
✖ delete this category

[<< Back Next >>](#)

Clear      Save      Quote

If medical conditions do apply, you can add these by selecting a condition category from the dropdown list and clicking “Add category.” As you do this, the Lifestyle tab will contract and turn green, now highlighting that valid data has been entered.

You can add as many categories as you wish at this point, including multiple cancers and multiple other conditions (a maximum of 5 each), however all panes will be highlighted red until they have been completed. You cannot move forward until these have either been completed or deleted. Any added condition categories can be deleted by clicking on the “delete this category” text located on the far-right hand side of the pane.

## MEDICATIONS

Depending on the condition selected the medication entry will vary:

Diabetes
⚠ One or more fields contain incomplete data
✖ delete this category

[Help on this screen](#)

\* mandatory fields

Date of first diagnosis \*

Type \*  Type 1  Type 2  Not known

Method of control \*  Diet only  Non-insulin (tablet/injection)  Insulin

**Current medications (for this condition)**

[Add medication](#)

Medication name	Dose	Dose unit	No. of doses	Frequency	Date started	
<input type="text" value="Start typing..."/>	<input type="text"/>	<input type="text" value="Please select..."/>	<input type="text"/>	<input type="text" value="Please select..."/>	<input type="text" value="mm/yyyy"/>	Remove

**Previous medications, if changed (for this condition)**

[Add medication](#)

Medication name	Dose	Dose unit	No. of doses	Frequency	Date ended	
<input type="text" value="Start typing..."/>	<input type="text"/>	<input type="text" value="Please select..."/>	<input type="text"/>	<input type="text" value="Please select..."/>	<input type="text" value="mm/yyyy"/>	Remove

You can enter current and/or previous medication taken for each relevant medical condition. If any data is entered on a line, then the entire line is mandatory with the exception of the 'Date started' field. You will not be able to move onto the next screen unless this data is either completed or the medications block removed. For Diabetes 'Previous Medications', the 'Date ended' field is mandatory.

## DIABETES INPUT SCREEN

**Diabetes**
⚠ One or more fields contain incomplete data
✖ delete this category

[Help on this screen](#)

\* mandatory fields

Date of first diagnosis \*

Type \*  Type 1  Type 2  Not known

Method of control \*  Diet only  Non-insulin (tablet/injection)  Insulin

**Current medications (for this condition)**

[Add medication](#)

**Previous medications, if changed (for this condition)**

[Add medication](#)

**Complications**

Heart disease \*  Yes  No

Retinopathy (excluding eye diseases) \*  Yes  No

Neuropathy \*  Yes  No

Kidney disease (protein in urine) \*  Yes  No

Peripheral vascular disease (ulceration) \*  Yes  No

Amputation \*  Yes  No

Poor circulation \*  Yes  No

**Most recent HbA1c readings (not blood glucose)**

Reading 1  Units  Date

Reading 2  Units  Date

**Hospital admissions (for this condition)**

Admitted to hospital as a result of diabetes  Yes  No

**Frequency blood glucose monitored**

Number of times monitored  Time period

## HEART INPUT SCREEN

**Heart**
⚠ One or more fields contain incomplete data
✖ delete this category

[Help on this screen](#)

\* mandatory fields

**Heart conditions \***

Heart attack	<input type="checkbox"/>
Angina	<input type="checkbox"/>
Heart failure	<input type="checkbox"/>
Aortic aneurysm	<input type="checkbox"/>
Cardiomyopathy	<input type="checkbox"/>
Heart valve disorders	<input type="checkbox"/>
Atrial fibrillation (AF)	<input type="checkbox"/>
Other irregular heart rhythm	<input type="checkbox"/>
Other	<input type="checkbox"/>

**Symptoms of heart conditions**

Symptoms at rest \*

Breathlessness walking from room to room \*

Breathlessness climbing stairs \*

Chest pains on minor to moderate activity \*

Chest pains on severe exertion only \*

Swollen ankles \*

Episodes of dizziness \*

Episodes of blackouts \*

**Arterial surgery**

Coronary artery bypass graft

Coronary angioplasty/stents

**Non-arterial surgery**

Aortic valve replacement

Mitral valve replacement

Tricuspid valve replacement

Pacemaker

Cardioversion/ablation

Aortic aneurysm repair

**Hospital admissions (for this condition)**

Number of times hospitalised for condition in last 10 years

Currently under cardiologist  Yes  No

Future treatment planned  Yes  No

Date of last stress ECG test



## HIGH CHOLESTEROL SCREEN

High Cholesterol
⚠ One or more fields contain incomplete data
✖ delete this category

[Help on this screen](#)

\* mandatory fields

Date of first diagnosis

Last two readings and dates (Total cholesterol)	Total	LDL	HDL	Date
	(mmol/l)	(mmol/l)	(mmol/l)	(mm/yyyy)
Reading 1	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text" value="mm/yyyy"/>
Reading 2	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text" value="mm/yyyy"/>

**Current medications (for this condition)**

[Add medication](#)

## HYPERTENSION SCREEN

Hypertension (High Blood Pressure)
⚠ One or more fields contain incomplete data
✖ delete this category

[Help on this screen](#)

\* mandatory fields

Date of first diagnosis

Last two readings and dates	Reading	Date
	(Systolic / Diastolic)	(mm/yyyy)
Reading 1	<input style="width: 40px;" type="text"/> / <input style="width: 40px;" type="text"/>	<input style="width: 60px;" type="text" value="mm/yyyy"/>
Reading 2	<input style="width: 40px;" type="text"/> / <input style="width: 40px;" type="text"/>	<input style="width: 60px;" type="text" value="mm/yyyy"/>

**Current medications (for this condition)**

[Add medication](#)

## ACTIVITIES OF DAILY LIVING (ADL)

If a serious condition category (all except High Cholesterol and Hypertension) has been added in the Annuitant Health tab, you must complete an Activities of Daily Living questionnaire.

**Annuity Comparison - Detailed Quotes**

Clear Save Quote

10 products available, 9 products able to quote << Back Next >>

Client Details Annuitant Health **Annuitant ADL** Contract Basis Remuneration Product Selection

Help on this screen

**Activities of Daily Living**

**Note:** The following new conditions have been added or modified: **Heart**.

\* mandatory fields

Please ensure that you have added all conditions before completing the following questions and then select all conditions which have led to each impairment.

Please indicate if there are any issues with the following activities \*  Yes  No

**Dressing**  Independent (including buttons, zips, laces, etc.)  Needs help, but can do about half unaided  Dependent, requires full assistance

**Mobility**  Independent (needs no assistance)  Walks with assistance (frame/stick, etc.)  Wheelchair user - non-permanent  Wheelchair user - permanent  
 In need of daily nursing care  Bedridden

**Transferring**  Independent  Minor help, can sit unaided  Major help  Unable, no sitting balance

**Bladder**  Continent  Occasional accident (once a week)  Incontinent/catheterised/unable to manage alone

**Bowels**  Continent  Occasional accident (once a week)  Incontinent (or requires enema)

**Bathing**  Independent  Needs some assistance  Dependent

**Feeding**  Independent  Needs some help cutting, spreading butter, etc.  Unable (nasogastric tube/PEG in place)

**Progression in the last 5 years**  Stable (no/minimum change)  Deteriorating (impact to 2 or more ADLs above/acute episodes)  Rapid deterioration

Clear Save Quote << Back Next >>

The ADL tab will only appear once a condition has been added. Where details of any conditions (excluding High Cholesterol and Hypertension) have been entered, further enhancements may be available based on the impact the condition has on the activities of daily living. You will first be asked to indicate if there are any issues with the activities. If you answer No, no further questions are applicable. If you answer Yes, you must answer each question relating to each impairment and where impairments exist, indicate which conditions (if any) have led to each impairment.

## CONTRACT BASIS

10 products available, 9 products able to quote  
[<< Back](#) [Next >>](#)

Client Details | Annuitant Health | Annuitant ADL | **Contract Basis** | Remuneration | Product Selection

[Help on this screen](#)

\* mandatory fields

Total purchase amount (Fund) \*

Fund source \*

Transfer or Open Market Option \*  Transfer  OMO

PCLS/Tax free cash required \*  Maximum  Nil  Specified  (generally limited to 25% of Fund)

Entitlement to PCLS/Tax free cash greater than 25%? \*  Yes  No

Do you have any additional pension benefits? \*  Yes  No

Contract type \*  Guaranteed  Investment linked

Annuity term \*  For life  Fixed term

Fixed term \*  Years  Months **OR** To age

Fixed term income options \*  Provider calculated  Minimum/Nil  Maximum  Amount:

Investment linked quote basis \*  Assumed bonus/growth rate  Required annual income

Assumed bonus/growth rate \*  %

Investment linked income \*  Minimum  Maximum  Amount:

Escalation \*  Level

Escalation % \*  %

Guaranteed period  years

Value protection  %

Value protection payment basis  On annuitant death  On second death

Commencement date (DD/MM/CCYY) \*  Today  Specified date:

Payment frequency \*  Monthly

In advance or in arrears \*  In advance  In arrears

With proportion \*  Yes  No

Dependant's % \*  %

Any spouse \*  Yes  No

Overlap \*  Yes  No

[Clear](#) [Save](#) [Quote](#) [<< Back](#) [Next >>](#)

You will need to complete the details above in relation to the Annuity contract the client requires. If you need help with a question, click the '?' icon above the list of questions. All fields marked with a '\*' are mandatory.

## REMUNERATION

10 products available, 7 products able to quote  
[<< Back](#) [Next >>](#)

Annuity Comparison - Detailed Quotes

Client Details | Annuitant Health | Annuitant ADL | Contract Basis | **Remuneration** | Product Selection

[Help on this screen](#)

\* mandatory fields

Advice type  Advised  Non advised

Basis of sale  Independent  Restricted  Simplified

Remuneration basis  Adviser charge  Commission

Adviser charge facilitated by provider?  Yes  No

**Initial adviser charge**

Adviser charge  %  £  Amount

[Clear](#) [Save](#) [Quote](#) [<< Back](#) [Next >>](#)

Please complete the information about whether there is an initial adviser charge and the type of advice offered by you the adviser.

## PRODUCT SELECTION

**Annuity Comparison - Detailed Quotes**

Clear Save Quote

10 products available, 6 products able to quote << Back Next >>

Client Details Annuant Health Annuant ADL Contract Basis Remuneration **Product Selection**

Help on this screen

Provider	Notes	Product	Availability	Selected
Aviva		Pension Annuity	Able To Quote	<input checked="" type="checkbox"/>
Canada Life		The Retirement Account	Unable to Quote	<input type="checkbox"/>
Canada Life		Lifetime Annuity	Able To Quote	<input checked="" type="checkbox"/>
Canada Life		Fixed Term Income Plan	Unable to Quote	<input type="checkbox"/>
Just		Pension Annuity	Able To Quote	<input checked="" type="checkbox"/>
Legal & General		Fixed Term Annuity	Unable to Quote	<input type="checkbox"/>
Legal & General		Pension Annuity	Able To Quote	<input checked="" type="checkbox"/>
LV=		Protected Retirement Plan	Unable to Quote	<input type="checkbox"/>
Scottish Widows		Annuity	Able To Quote	<input checked="" type="checkbox"/>
Scottish Widows		Enhanced Annuity	Able To Quote	<input checked="" type="checkbox"/>

Clear Save Quote << Back Next >>

This screen will show which products are able to quote and which are unable to quote. If you want to see the reason why a product is unable to quote, click on 'Unable to Quote' for that product and it will provide a pop up explaining why (see example on the right). When you are ready to quote, select "Quote" at the top or the bottom of the page.

An embedded page at annuities.assureweb.co.uk says

Commission is not supported  
Non advised sales are not supported

OK

## QUOTE RESULTS

**Annuity Comparison Service - Results**

Requote Quote Input Confirmation View Comparison Reports

**Annuant:** Mr Andrew Smith a Male life aged over 70, smoker, health details entered [view quote summary]

All expected responses received. Please click on "Products Not Quoting" for details of products that have not returned a quote. Click headings like **hi** to sort results.

Quote Details **Products Not Quoting**

Provider and Product	Apply	Annual Annuity (£)	Confirmed Guaranteed Rate	Term	Remuneration (£)	Illustration / Documents
Scottish Widows Enhanced Annuity	<input checked="" type="checkbox"/>	13779.12	Yes	For Life	5625.00	View
Aviva Pension Annuity	<input type="checkbox"/>	13462.68	Yes	For Life	3796.88	View
Canada Life Lifetime Annuity	<input type="checkbox"/>	11835.84	Yes	For Life	3750.00	View
Scottish Widows Annuity	<input type="checkbox"/>	11024.88	Yes	For Life	3000.00	View
Just Pension Annuity	<input type="checkbox"/>	10853.40	Yes	For Life	1875.00	View
Legal & General Pension Annuity	<input type="checkbox"/>	13532.52	No	For Life	3187.50	View

Requote Quote Input Confirmation View Comparison Reports

This is the Results Screen, it will show the Provider and Product, the Annual Annuity amount, whether the rate is confirmed guaranteed rate, the term, and the remuneration for selling this product. You will also be able to view the illustrations and documents by clicking 'View'. You can also access 'Quote Input Confirmation' and 'View Comparison Reports' at the bottom of the table.

**View Documents**

**Scottish Widows Enhanced Annuity**

**Provider Warning Messages**  
No warning messages.

**Client Specific Illustrations**


- Client Specific Illustration - View
- Pre-Populated Application Form - View

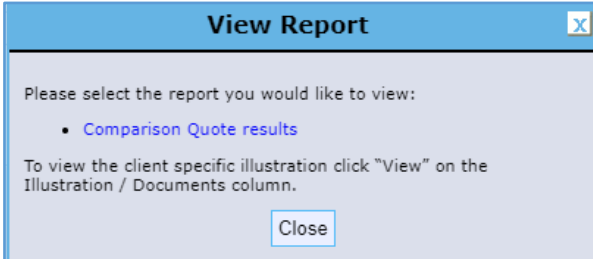
**Product Literature**

- Scottish Widows Annuities Adviser Guide - 24650
- Enhanced Annuity Important Notes for Applications - 46718A
- Annuity Key Features Document - 53001
- Scottish Widows Annuities Customer Guide - 56793

Close

Here you can access any provider warning messages, illustrations, any data capture/application forms, and any future product literature.

Provider warning messages can also be viewed by using  on the results screen.



Select 'View Comparison Reports' on the Results Screen to get a PDF of the comparison report.

**Annuity Comparison Report**

**Assureweb**  
...An iPipeline Product

**Annuity Comparison Service**    **Your Reference:** Test    **Date Illustration Requested:** 13/04/2021  
**Date Printed:** 13/04/2021

**Life Details**  
**Annuitant:** Mr Andrew Smith, a male life aged over 70, smoker, health details entered

Comparison table for a Single Life Annuity  
**Total Purchase Money:** £250,000  
**PCLS / TPC Amount:** Maximum  
**Guaranteed Annuity:** For Life  
**Payout:** monthly in advance, without proportion, without guarantee period  
**Escalation:** No escalation

**Advice Type:** Advised  
 **Basis of Sale:** Independent  
**Remuneration Basis:** Adviser Charge  
**AC Facilitated by Provider:** Yes  
**Initial Adviser Charge:** Amount of £500, to be deducted from Purchase Amount after Tax Free Cash

Notes	Provider and Product	Annual Annuity £	Confirmed Guaranteed Rate	Term
	Scottish Widows Enhanced Annuity	14,170.08	Yes	For Life
1	Legal & General Pension Annuity	13,770.60	No	For Life
2	Aviva Pension Annuity	13,705.08	Yes	For Life
	Canada Life Lifetime Annuity	12,046.80	Yes	For Life
3	Canada Life The Retirement Account	12,049.56	No	For Life
	Scottish Widows Annuity	11,176.32	Yes	For Life
	Just Pension Annuity	10,934.40	Yes	For Life

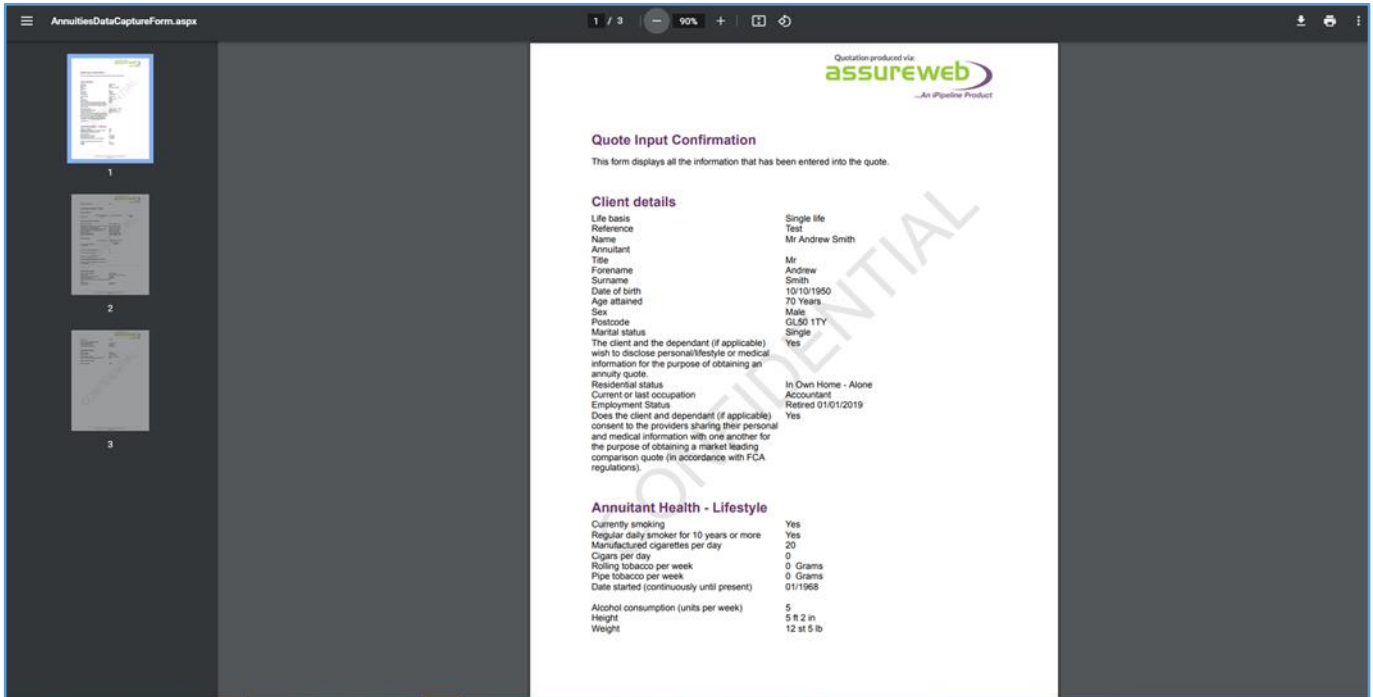
The Provider has returned notes to accompany this quote. Please refer to the table below for more details.

iPipeline Limited. iPipeline Limited. For the use of professional financial intermediaries only.  
Page: 1 of 3

You can print or download this information in the top right-hand corner.

## QUOTE INPUT CONFIRMATION

Select 'Quote Input Confirmation' on the Results Screen to display a PDF of all the information that has been entered into the quote. You can print or download this information in the top right-hand corner.

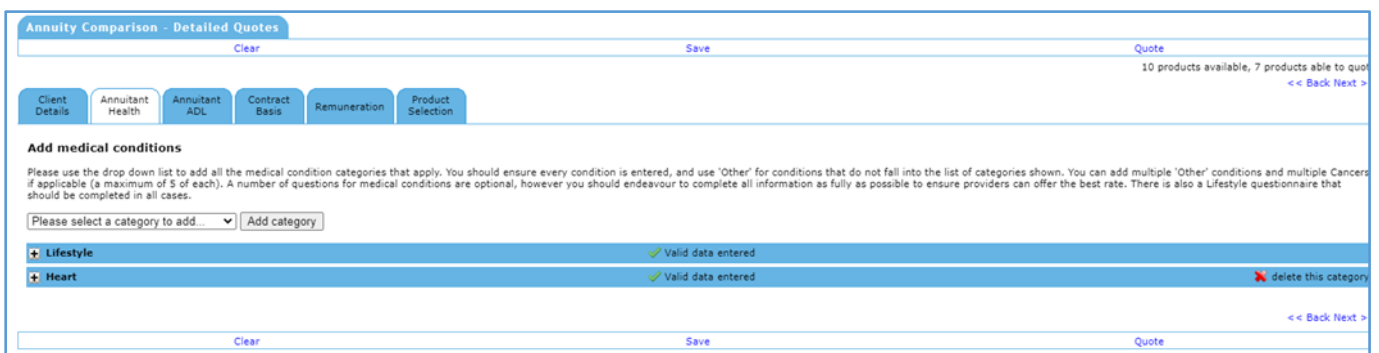


Some providers will require this to be printed and signed by the annuitant (and dependent if applicable) to confirm that the information entered is correct to proceed with the application. An insurer may also seek to obtain independent verification of this information from the client's doctor. If it is subsequently found that the questions were not answered accurately or completely then that could result in your client's income being reduced.

## PART SAVE

At any point during the entry of the quote request you can Part Save. For example, if you did not have all the client medical information, you can complete what you know and save the quote request to retrieve it later from the 'Find My Quote & Apply' area.

If you are unable to complete a screen with the relevant information to successfully validate it, click 'Save' to save the quote request in its current state.



An embedded page at annuities.assureweb.co.uk says  
Your comparative quote request has been saved.  
You may review this quote at any time in the 'Find My Quote & Apply' area.

OK

You will receive confirmation the quote request has been saved.

You can find your saved quote or any completed quotes under 'Find My Quote & Apply' on the left-hand menu.

- Protection Services
- Retirement Planning
- Investments
- Equity Release
- Other Services
- Find My Quote & Apply

**Find My Quote & Apply**

**Search**

**Simple Search**  
Client Name  Date Range  or Date  dd/mm/ccyy

**Advanced Search**  
Client Reference  Transaction Type   
Product Type  Company Name

Please note: Comparison quotations are stored for a maximum of 30 days; Applications will be stored over 30 days.

Type	Request Date	Expiry Date*	Client Ref.	Client Name	Company & Product	Apply	View	Delete
CQ	13/04/2021 09:32	13/05/2021	Test	Mr Andrew Smith	Annuity Comparison Detailed Quotes		<a href="#">Saved</a>	<input type="checkbox"/>
CQ	13/04/2021 09:24	13/05/2021	Test	Mr Andrew Smith	Annuity Comparison Detailed Quotes	n/a	<a href="#">Compare</a>	<input type="checkbox"/>
CQ	13/04/2021 09:23	13/05/2021	Test	Mr Andrew Smith	Annuity Comparison Detailed Quotes	n/a	<a href="#">Compare</a>	<input type="checkbox"/>
CQ	13/04/2021 09:21	13/05/2021	Test	Mr Andrew Smith	Annuity Comparison Detailed Quotes	n/a	<a href="#">Compare</a>	<input type="checkbox"/>

Page: (1 / 1)

\* This expiry date denotes when an entry will be deleted; it does not signify that a quote will be valid until that date.  
Key: CQ - Comparative Quote, SQ - Single Company Quote, A - Application  
Please note that PMI quotes cannot be retrieved from this area.

The quote request can be retrieved for up to 30 days from the saved or quoted date. You can access quotes by clicking on 'Saved' or 'Compare' in the 'View' column.